

# GAINING SYNERGY WITH PROPOSAL PROCESSES

How to Have an Efficient Proposal  
Process for Small Businesses

Written by: Jessica Davis, KL&A Proposal Manager

# TABLE OF CONTENTS

Gaining Synergy ..... 1

1. Create a repeatable process..... 2

2. Use A Prescribed Folder Structure ..... 2

3. Use Collaborative Tools ..... 3

4. Build Templates with Pre-Configured Styles ..... 4

5. Build A Well-Organized Library of Assets ..... 5

6. Use Variables ..... 6

7. Use Macros ..... 6

8. Build A Costing Spreadsheet..... 7

9. Plan Work..... 8

10. Hire A Proposal Manager..... 9

Synergy Will Yield Higher Profitability ..... 10

About KL&A..... 11

KL&A Can Help ..... 12

# GAINING SYNERGY

Writing proposals in response to RFPs/RFQs (or responding to requests for information) can be a costly process, especially when writing proposals for custom work, such as custom software development. The process traditionally involves:

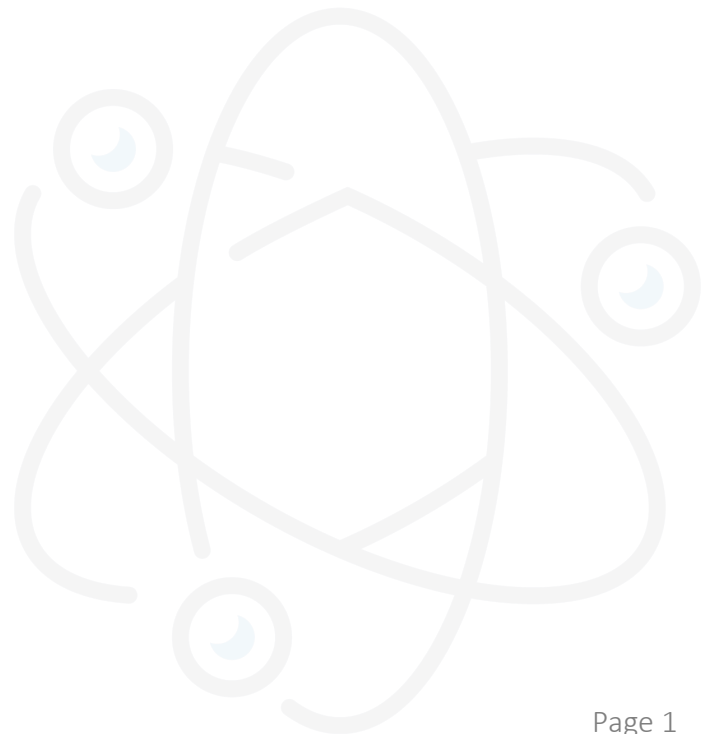
- A leader to evaluate whether or not to bid;
- A technical team to design the solution and estimate the effort;
- A pricing team to determine the price tag;
- A project manager to develop a work plan and schedule;
- A proposal team to build the response; and
- A review team to proofread and score.

To complicate matters, some industries require proposals to be submitted in specific formats. In fact, the majority of the RFPs/RFQs to which KL&A responds require proposals to be in Microsoft Word format.

There are proposal tools that can improve efficiency, but they can be pricey and may be difficult to find one that meets all of your organization's requirements.

So how can a small company afford the proposal process? In short, *synergy*.

Here's 10 ways that can help you create synergy in your proposal processes to yield faster and higher-quality proposals over time.



# 1. CREATE A REPEATABLE PROCESS

If everyone on the team understands the process, the team can function more effectively. Everyone needs to know where to find the solicitation documents, where to place their contributions, which tools to use, who to turn to for help, what voice to use when writing, and who is doing which tasks.

Of course, documenting the process in an easily-accessible location (such as a company wiki) is great, but let's face it, people won't read it unless they are absolutely stuck.

The key is making the process as easy as possible and having someone who knows the process lead the effort. After developing a proposal or two, it will be second nature for everyone on the team.

# 2. USE A PRESCRIBED FOLDER STRUCTURE

Part of the process should involve a prescribed folder structure to store the proposal and all supporting documentation. If the folder structure is the same for every effort, everyone will know where to look for what they need, where to put their contributions, and where to find information from past proposals. An example of a simple folder structure might be:

- Input (for the RFP and other documents that are inputs to the process)
- Output (for the delivery-package files)
- Source (for the source files used to develop the response)

Subfolders can further organize the project and can provide the team lead with a way of controlling access. For example, within the Source folder, you might create a subfolder for each contributor or subfolders for specific items of the proposal such as the schedule and resumes.

Finally, keeping the folders “clean” of interim copies is *imperative* for efficiency. If people save off versions of the document (and some folks like to do that a lot), move them to an Archive subfolder so they are accessible, but will not be in the primary folder structure to confuse the team.

### 3. USE COLLABORATIVE TOOLS

Collaborative tools can dramatically increase team efficiency and they can safeguard against loss of a resource. For example, if everyone works on a shared drive, you'll never run into that situation where content is on someone's hard drive and they are suddenly out-of-pocket.

At KL&A, we use the following collaborative tools:

- Google Drive to house the shared folder structure.
- Google Docs and Google Sheets to work collaboratively on certain sections before plugging them into the proposal document.
- Altassian Confluence to provide a single location for team communication. We create a page for each proposal and use it to:
  - Record questions for the organization that issued the RFP;
  - Summarize technical response requirements;
  - Summarize schedule requirements;
  - Provide a link to the procurement site;
  - Have team conversations; and
  - Record any other details that the team may need.



## 4. BUILD TEMPLATES WITH PRE-CONFIGURED STYLES

Instead of building each and every proposal from scratch, create a template with pre-configured sections and styles that make it fast and easy to create new proposals. The template doesn't have to contain canned content, it just has to provide structure, styles, macros, regularly used variables, etc.

*Structure* refers to sections that are configured with the appropriate headers and footers. For example, proposals may begin with a cover letter on company letterhead, following by a proposal signature section then, a table of contents section, multiple body sections, multiple resume sections, and one or more appendices. Having these sections pre-configured will reduce the amount of time required to build the proposals.

*Styles* are pre-configured formatting for various elements of the document, such as paragraphs, selected text, and tables. Styles provide several benefits:

- Much faster formatting;
- Ability to mass update;
- Numbering control;
- Indentation control;
- Pagination control;
- Paragraph spacing control; and
- Consistency in the look of all content throughout the document.

Styles help your team to produce esthetically-pleasing, consistently-formatted content, faster and with less frustration, because they won't have to fight with Word.

In Word, template files have a .dot or .dotx extension and can be saved in a location that allows you to create a document from the template, right from the File menu. Here is a helpful video:

<https://www.youtube.com/watch?v=IhDDF0EAxfc>

## 5. BUILD A WELL-ORGANIZED LIBRARY OF ASSETS

Re-use is the primary key to increasing productivity.

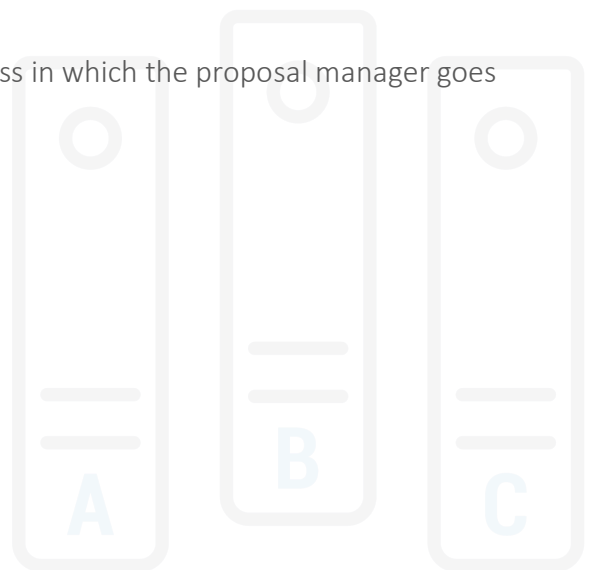
All RFPs request information about your organization, such as history, financial stability, leadership, past experience, etc. Your proposal response will need to explain how you will execute the project. You will also need to include resumes for named key resources. In fact, the vast majority of the information in a proposal can be reused. However, making that content easily accessible can be difficult without a proposal management tool.

Sure, you can search through past proposals to find relevant content, but that can be time consuming and frustrating.

Instead, build a library of “assets” with a logical folder structure that will make it easy for anyone in the organization to find content by type. An asset is a copy of your response to a specific and/or topic that is housed in a separate, stand-alone document. Place each asset in a separate Word document with a logical title and consider sort order when you are naming the files. For example, we prefix all past project description assets with “Exp\_” followed by the project name so that all past project descriptions will be grouped in the File Explorer window.

If you have a tool like Confluence, you can upload the assets and apply labels that will help with searchability. However, there are a number of ways to build an asset library.

At KL&A, we have a close-out phase as part of our proposal process in which the proposal manager goes through the document and creates and/or updates asset files.



## 6. USE VARIABLES

Another factor that improves the efficiency of the asset library is the use of variables. When building an asset think about what information will need to be changed the next time you need to use that asset. Replace that text with a variable. For example, you might create variables for information like the RFP number, client name, buyer name, and project name. In Word, variables are called Custom Properties.

Just remember that if you create a variable in an asset, you must create the same variable in the Word template. Otherwise, Word will return an error when you plug-in the asset because it cannot return the variable's value.

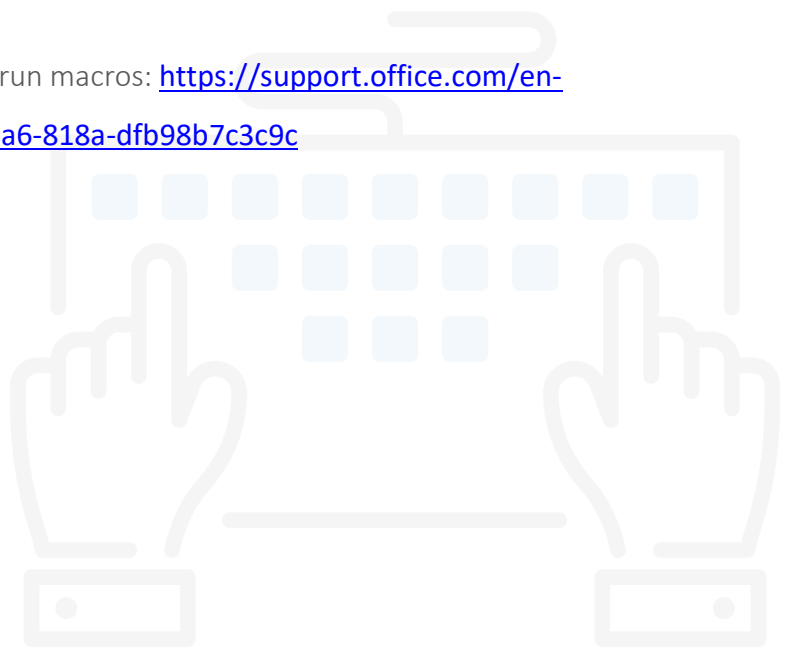
Here is a free macro for copying custom properties from one file to another:

[https://word.tips.net/T001340\\_Copying\\_Custom\\_Properties.html](https://word.tips.net/T001340_Copying_Custom_Properties.html)

## 7. USE MACROS

Macros are a wonderful way to accomplish routine tasks quickly. For example, if you are inserting a bunch of graphics that call for the same formatting, you can use Word's macro recorder to record the steps you take on one graphic. Then, you can run the macro on each subsequent graphic to execute all the steps with one click of the mouse.

Here's a helpful link that explains how to record and run macros: <https://support.office.com/en-us/article/create-or-run-a-macro-c6b99036-905c-49a6-818a-dfb98b7c3c9c>



## 8. BUILD A COSTING SPREADSHEET

Developing a price for a fixed-price proposal can be a daunting task. Accurate estimation of effort is required to calculate a price that is high enough to yield a profit, yet low enough to win the bid. This can be complex and eat a lot of time. If you are manually calculating cost over and over again, consider building a spreadsheet that will do the calculations for you.

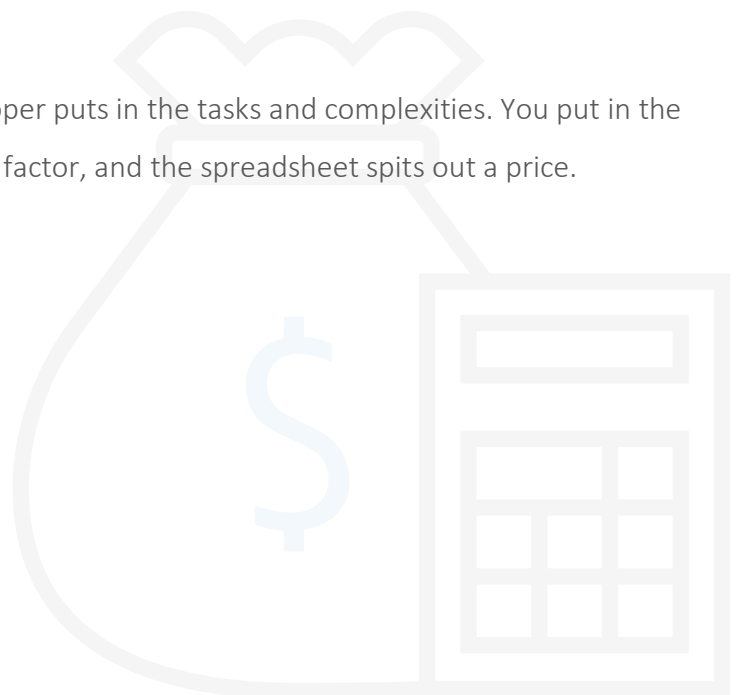
This requires carefully assessing the way you estimate effort and how you apply costs to that effort, so that you can build a spreadsheet that reflects that process. For example, you might have the architect of the proposed solution create rows for high-level tasks and assign an hour estimate or complexity estimate to each row. If you use complexity estimates, then you will need to figure out the ratios of hours to complexity value and write a formula that will return hours based on complexity value inputs.

Then you can use the summarized effort to drive estimates for ancillary tasks, such as project management, business analysis, and testing. Of course, you will need to understand the average percentage of development time that these activities require. If you don't know, start recording hours by job and job classification. Eventually, you will develop fairly accurate factors for the ancillary tasks.

You can also build a risk factor into your calculations that will increase price for riskier projects.

Finally, the formulas need to consider hourly rates by job classification, so that you can input the rates and see how it affects the price.

If the sheet is built correctly, the architect or developer puts in the tasks and complexities. You put in the number of resources by role, the rates, and the risk factor, and the spreadsheet spits out a price.



## 9. PLAN WORK

Writing a proposal can involve a lot of moving parts. With short turnaround times and hard deadlines, it's important to know who is doing what and how they are progressing. It's also important to identify the critical path and task dependencies so that you can stay on top of those tasks to avoid bottlenecks that hinder progress.

The first step in building the work plan is developing the proposal skeleton. That is, someone needs to go through the RFP with a fine-tooth comb and create the proposal document headings (i.e., the skeleton of the response).

**Note:** I recommend copying and pasting instructional content from the RFP into the corresponding sections, highlighting it, and marking it with a comment. This helps the contributors in developing content for the section. This text should be deleted when the section is written. The purpose of the comment is to easily find the text for removal.

For each heading in the “skeleton,” you can create one task in the work plan. At this point, you also need to identify ancillary tasks relating to the section tasks. For example, if the RFP requires resumes for three named key personnel, you need to create:

- 3 tasks for inserting resumes, one for each named resource (section tasks)
- 3 tasks for verifying resume currency, one for each named resource (ancillary tasks)
- 3 tasks for identifying who will be named for each role (ancillary tasks)

Essentially, you are creating a work breakdown structure for the proposal effort.

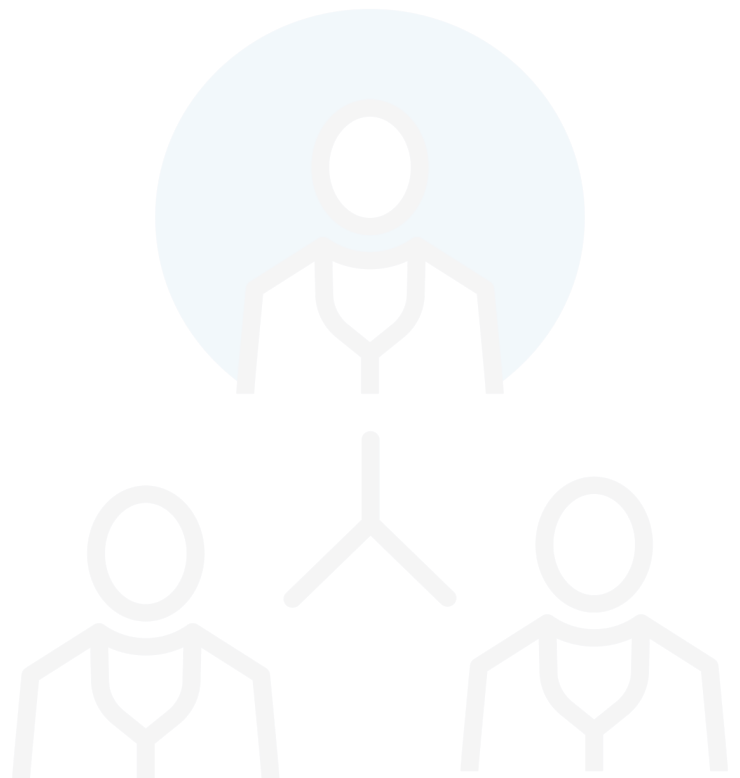
Once you have all the tasks defined, assign the tasks to contributors and specify due dates.

Though you can build the work plan in a robust project management tool, such as Microsoft Project, the effort and licensing cost may be prohibitive. Given the short timeline of most proposals, a spreadsheet works just fine.

# 10. HIRE A PROPOSAL MANAGER

Finally, the entire process needs to be managed by someone with strong analytical, organization, and writing skills. This individual needs to be able to:

- Analyze the RFP to build the skeleton;
- Identify all the ancillary tasks;
- Organize assets for intuitive access;
- Write content;
- Review technical solutions and work with technical resources to ensure the solutions are complete;
- Work with varying teams of contributors;
- Proofread;
- Use all the tools in the process at a high level of proficiency; and
- Monitor and improve the process.



# SYNERGY WILL YIELD HIGHER PROFITABILITY

While having proposal management software would be wonderful, such packages often require a substantial investment in terms of learning curves, configuration, and licensing costs. If your small company isn't quite ready to make the investment, you can still achieve the benefits of synergy by incorporating an organized and efficient process.

As your resources learn the process, tools, and templates they will become faster at producing content. As they learn the style guidelines, your contributors will begin consistently producing content in a uniform voice that will reduce rewrites and shorten editing cycles. As your library of assets grows, your team will turn out proposals faster and faster. And because those assets get reviewed and revised, each time they are used, the quality of those assets will increase over time.

More proposals mean more opportunities to win work. Higher quality proposals mean better win rates. Together, these factors will work on both sides of your income statement, reducing expenses and increasing revenue, which will yield higher profitability.



# ABOUT KL&A

Kunz, Leigh and Associates (KL&A), contrary to how it sounds, is not a law firm. KL&A is a custom software development and professional services company serving private and public sector clients throughout the Midwest.

Since 1992, we've specialized in providing innovative solutions to organizations looking to increase their productivity, performance, and profitability. Whether it's building a new web application, developing a mobile app, or reengineering business processes, we provide creative and cost-effective solutions to improve our clients' businesses.

Our most valuable asset is our team of superheroes. Equipped with a computer, caffeine, and the skills necessary to make the impossible possible, our team has the creativity, dedication, and diversity to produce unique solutions that clients didn't even know were possible.

[www.kunzleigh.com](http://www.kunzleigh.com)

248.559.7910

28081 Southfield Road

Lathrup Village, MI 48076



# KL&A CAN HELP

Developing the perfect proposal process for your small company will take time and patience.

If you don't have the resources or time to develop your process, or if you find yourself struggling, then reach out to us at KL&A. We'd be happy to help you create a process that works best for you.

**Let's partner up.**

For more information, call 248.559.7910 or email us at [info@kunzleigh.com](mailto:info@kunzleigh.com).